

Autobooks Standard Self-Service Enrollment*

Autobooks offers simple, self-service enrollment online. To get started, a user simply navigates to the Autobooks portion of [online banking](#).

***Note:** This process applies to those Financial Institutions that use Vantiv Worldpay as their payment processor. Please see our non-Vantiv guide for details.

ENROLLMENT TAKEAWAYS:

- » Businesses can self-service online **24 hours** a day, **365 days** a year
- » Autobooks Terms and Conditions must be accepted to enroll

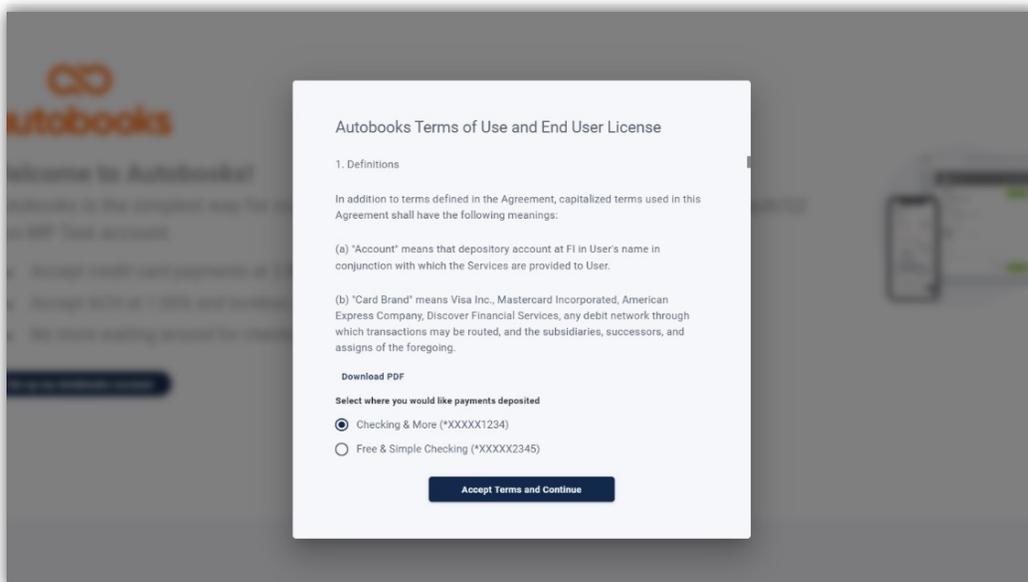
Check out the step-by-step enrollment process below:

Step 1:

- » The business owner will click on Autobooks within [online banking](#).

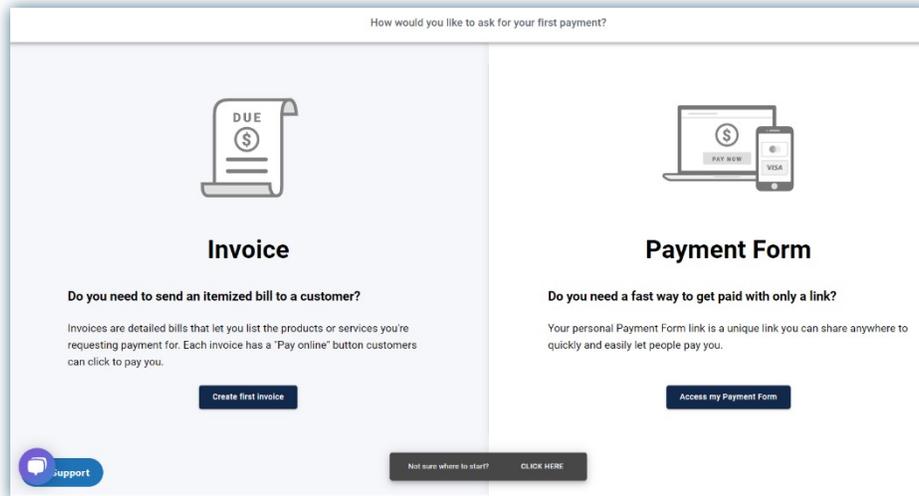
The Terms and Conditions will display and allow the user to select which checking account they wish to deposit funds (if the user has more than one checking account with the financial institution).

- » **NOTE:** The background of this screen has been blurred intentionally to the user.



Step 2:

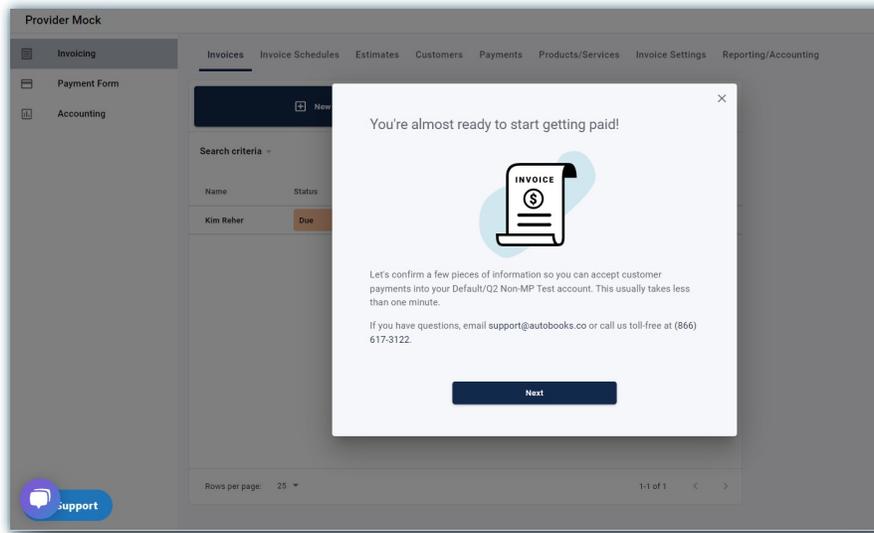
» The user will be taken to a short tutorial. They can choose to create an invoice or access their payment form..



Step 3:

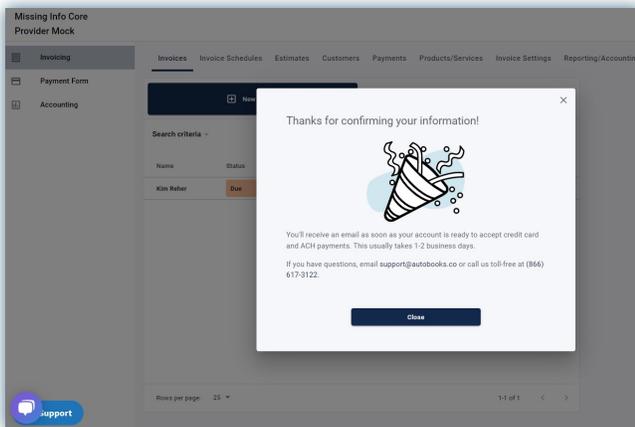
» Once the user completes the tutorial If Autobooks is missing key data for the business, we will ask for the information now.

Key data is: The owner name, phone number, date of birth, SSN, or home address of the business and/or business owner.



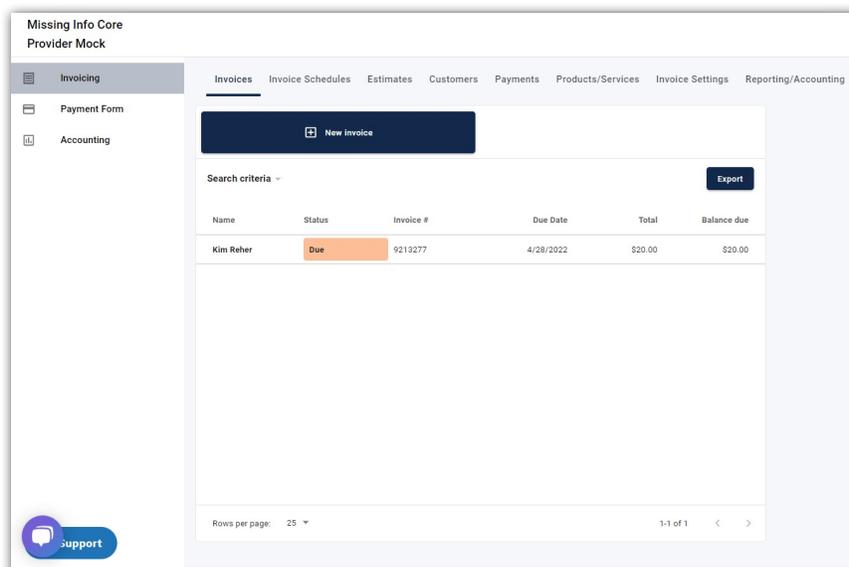
Step 4:

» User will see a confirmation once the **key data** has been entered. The user may click away from the key data gathering modal at any time before completion. If the user does click away, there will be a **persistent (clickable) reminder message** that key data is required for payment processing approval. The business cannot process their first payment without providing this information.



Step 5:

» The user will first access the “**lite**” version of Autobooks. This version will show the full **Invoicing and Payment Form** functionality, with all other Autobooks traditional tabs repressed. The user can stay with the lite version (at no monthly subscription fee) OR they may upgrade to add accounting/reporting features for a monthly fee.



Once complete, the user can **upgrade** their Autobooks experience with additional features!

To add **Accounting, Reporting and other features** the business owner must click the tab labeled “Accounting” within the Lite version. They will see monthly subscription and processing rate information, and click “Activate Autobooks” to complete their upgrade.

Once activated, the business owner will see the traditional **Autobooks view!**

